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ABSTRACT

This study identified seven categories of influence of local college governing boards, based on how they were established and their members appointed. Information was drawn from questionnaires sent to staffs of statewide coordinating bodies and multicampus governing boards; from statutes, local board policies, bylaws, and handbooks; and from interviews of board members and administrators. The study identified 41 local governing boards of public multicampus universities in 28 states. The seven categories, ordered by level of influence are: (1) local boards receiving broad authority delegated by legislation, the governing board, or both; (2) local boards created by governmental and/or university authority; (3) local boards with some members also serving on the overall governing board; (4) local boards given only limited authority by legislation; (5) local boards with limited authority, created as statutory successors to boards of previously independent institutions; (6) local boards with limited responsibility and with members appointed by the overall governing board or head of campus; and (7) local boards that are primarily advisory boards to the campus head. Recommendations include specific statements of duties and policies, defined areas of local responsibility, linkages between governing and local boards, administrative and staff support for local boards, and liability insurance for members of local boards. (JLS)

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Association of Governing Boards
of Universities and Colleges

# The "Local Board" in Multicampus Systems and Universities

By Edgar B. Schick

AGB OCCASIONAL PAPER No. 25

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## EXECUTIVE SUMMARY

Governing boards of multicampus universities and systems oversee about two-thirds of our public campuses, serving 55 percent of all college and university students. One of the most significant aspects of multicampus governance is the growth in numbers and influence of local boards.

Local boards exist in greater numbers than education leaders previously thought. Twenty-eight states have local boards. In states with no local boards (and in some with few systems, multicampus universities, or free-standing universities), 50 or 60 laypeople monitor, report on, and champion public higher education. In states with local boards, that number may reach 500 or 600. Typical responsibilities of local boards include the following:

- They are advocates on local and some state issues, public and governmental relations, and financial enhancement.
- They assess campus priorities in light of area needs, provide advice, and make recommendations.
- They participate in the search for the campus head and frequently, in performance evaluations.
- They meet with accreditation teams.
- They participate in plant planning and maintenance for real property the local boards have helped acquire or for which bylaws hold them accountable.

This paper is based on a study that identified seven categories of influence of local boards, based on how they were established and their members appointed. The most influential are those boards delegated by legislation, a governing board, or both; the least influential are those that primarily advise the campus head, who may have created the board or appointed its members. The study also makes observations and recommendations in local board membership, leadership, activities, and organization and structure.

## PREFACE

This Occasional Paper is the second of two papers on the topic of local campus governing and advisory boards within public multicampus systems and multicampus universities, which stem from a project directed by Edgar B. Schick and supported by the Robert L. Gale Fund for the Study of Trusteeship. This paper, supported by funds from the W.K. Kellogg Foundation, should serve as a useful guide for policy makers, education officials, and trustees contemplating the creation of local boards or seeking to improve the performance of existing ones. The recommendations and conclusions, based upon numerous interviews and the author's own observations, are essential reading for all interested persons.

The growth of higher education in the 1950s and 1960s brought with it a trend toward centralized authority in public institutions, marked by the creation of statewide coordinating boards, the founding of branch and satellite campuses of large universities, and the consolidation of single institutions or smaller systems into larger public university systems. Not surprisingly, these changes prompted concerns about damage to institutional autonomy and presidential leadership. As one possible solution, the Carnegie Commission on Higher Education issued in 1971 a guarded recommendation on the establishment of local campus governing boards. In its report *The Capitol and the Campus: State Responsibility for Postsecondary Education*, the Commission stated, "It is...possible that establishment of boards for each campus within a multicampus institution would be advantageous.... On the other hand, in certain communities, a local board with members who are drawn from the community of the institution might act as a more effective conduit of any adverse public reaction."

In *The Guardians*, published by AGB in 1989, Clark Kerr and Marian Gade also recommended that "campus-based boards with appropriate delegated authority within systems should be considered, where they do not already exist, especially within consolidated systems." Even more recently, in a 1993 AGB Special Report, *Four Multicampus Systems: Some Policies and Practices that Work*, Marian Gade closely examined the University of North Carolina system, a structure in which local boards of trustees play important roles in many areas of campus governance.

When Edgar Schick proposed a national study of local governing and advisory boards, the Gale Fund selection committee saw this as the first opportunity for a serious, in-depth analysis of what has been, until now, an overlooked segment of governance in public higher education. The author's findings intrigued and—in some cases—surprised us.

For example, local boards exist in much greater numbers than originally thought. Many have been established recently; others "survived"

the consolidations of earlier decades, albeit with significantly different responsibilities. Local boards now exist in 28 states and in 41 university systems and multicampus universities, and others are seriously considering creating such boards. The responsibilities of local boards vary considerably; some created at the president's discretion are merely advisory, but others appointed by the governor have considerable clout and autonomy. It's apparent that policymakers see local boards as a way to infuse an element of decentralized decision making within larger governance structures.

The existence or establishment of local boards raises interesting questions. What will be the nature of the relationship of the local board to the system or university board? Will these boards enhance presidential leadership, or will presidents feel confused by being asked to serve one additional "master"? Will local boards create interests that are too parochial or independent and subsequently undermine system or university cohesion, or will they strengthen overall governance by giving the system board and executive the freedom to concentrate on broader responsibilities?

Support from the W.K. Kellogg Foundation allowed AGB to convene an advisory panel for an important one-day meeting before the final drafting of this paper. Giving thoughtful advice to the author and AGB were the following educators: Paul Weller, president of Framingham State College; Judy Duken, a member of the SUNY Board of Trustees and former member of the SUNY Plattsburgh local governing council; Aims McGuinness, senior associate at the National Center for Higher Education Management Systems and trustee of the State Colleges of Colorado; Cecelia Foxley, commissioner of higher education, Utah; and Marian Gade, University of California at Berkeley. Many of their thoughts and comments are reflected in this paper.

The first paper, *The "Local Board" in Public Systems and Multicampus Universities*, is a more extensive review of the authority of the local boards in the 28 states. For those desiring in-depth knowledge of this subject, the 112-page report is available at a modest price from the AGB Publications Department.

Richard Novak
Director, Public Sector Programs
AGB

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Governance and coordination of public higher education—both its structure and its performance—understandably concern public officials; members of governing, coordinating, and advisory boards; and educators alike. In many states, government and academic leaders wrestle with structural concerns. They are under pressure to empower citizens and academicians at the site of the essential action of the academic enterprise—the campus itself. At the same time, they demand oversight by and accountability to the public at large. This ongoing dialogue and controversy is often expressed as "decentralization" versus "centralization." The debate is all the more challenging because of the large number of students enrolled at public institutions—almost 80 percent of America's college students!—and the complexity of governance structures in the public sector.

***The organization and operation of trustee governance in the public sector in general and in multicampus structures in particular directly influence a majority of students, faculty, and others served by public colleges and universities.***

Governing boards of multicampus universities and systems are responsible for about two-thirds of our public campuses, serving 55 percent of our college and university students. Therefore, the organization and operation of trustee governance in the public sector in general and in multicampus structures in particular directly influence a majority of students, faculty, and others served by public colleges and universities. A single governing board may oversee a structure that covers an entire state, encompassing institutions ranging from locally based community colleges and vocational-technical institutes to internationally renowned research institutions. Trustee governance arrangements within these multicampus universities and systems vary; no single form is best. Twenty-eight states have campuswide local boards within these complex structures, involving citizens from a campus' local service area in various aspects of trusteeship.

Because complex public university structures in a majority of states have local boards—and because in at least three states, these boards' numbers and roles have been expanding—it is time to investigate their organization and function. This study summarizes information from questionnaires sent to staffs of statewide coordinating bodies and multicampus governing boards; statutes, local board policies, bylaws, and handbooks; and telephone and personal interviews with members of governing boards and local boards, as well as with administrators at campus and system levels.

These sources revealed extensive variation and individuality in local board structure and operations. Functions of local boards range from informal advice to decision-making authority. Board members may be appointed by campus heads, multicampus governing boards, or governors and legisla-

tors. Statements of their appointment methods and their duties may be codified in regulations and statutes at the county and state levels, set down in policy manuals, or simply left to campus discretion. Still, these local boards have one thing in common: They enable citizens to participate in public higher education's oversight and its communication with external constituents. Many states and complex universities have developed a "trustee governance continuum." Participation in governance recommendations and decision making is much broader and more diffused than was the case a generation or two ago. This study will offer information on how trusteeship functions in complex public systems and multicampus universities in 28 states across America.

***Local boards have one thing in common: They enable citizens to participate in public higher education's oversight and its communication with external constituents.***

As many states consider modifying their governance structures and because individual systems and multicampus universities frequently alter their organizational arrangements, a study like this always will be a work in progress. For that very reason, this paper could be useful to leaders of other complex organizations as they balance the need to encourage citizen participation at local and regional levels with expectations for broad public oversight and the benefits of economies of scale.

### The Local Board and its Environment

To begin, we should explain "local board." For this study, a local board is a body of citizens appointed to serve as "outside insiders" for a single campus in a multicampus structure that has an overall governing board. The members carry out certain (sometimes limited) trusteeship functions. Final decision making on certain topics may have been delegated to them by law or by the governing board, but their greatest influence and authority often derive from their standing in the community and the subsequent impact of their advice.

While the source of a local board's creation and appointment (statute, university bylaws, local campus head, or self-creation and perpetuation) may vary, we considered an organization to be a local board if it has a formal relationship with its campus, the senior university, or system. Many local boards were created by a campus head or the overall governing board head and its senior staff. In other cases, even within the same multicampus university, they began—and may continue—as a group of citizens who offered instructional programs in their geographic areas. The study did not include "rogue" citizen groups that support higher education in their area but have no official relationship to the campus head or the university's governing board and administration.

· While this study uses the term "local board" generally, the groups themselves use various names, including board, council, committee, or even commission. Their members are often called trustees or visitors, but apparently never designated regents or governors. We did not include bodies identified as foundations even if they have a contractual agreement with the campus, are subject to governmental audit (or other review by state or campus authorities), or participate in other campus governance activities (such as executive searches and screenings). In addition, we included only campuswide bodies, not groups related to specific academic disciplines or components of a campus. A few more distinctions were made for this study:

- We looked only at public universities and colleges, even those that do not have the word "state" in their names or receive only a small portion of their operating income from state appropriation. Independent multicampus universities were not, even if they receive government funding.
- Unless otherwise noted, systems and multicampus universities were studied together, although there are organizational differences between them. In particular, in a multicampus university, the head of the entire structure is also the head of the main campus where there is no local board. In a system, on the other hand, the administrators who lead the system are different from those who lead the main campus, and systems using local boards have a board at the main campus as well.
- A "campus" may be either a separate institution within a system or a branch or regional campus of a multicampus university. For example, Frostburg State University within the University of Maryland System, Framingham State College in Massachusetts, the Tacoma campus of the University of Washington, the regional campuses of Kent State University in Ohio, and Oklahoma's Regional Higher Education Centers all were included. While the distinction between a regional campus and a branch campus may be quite important to a university, this study uses the terms interchangeably, unless otherwise noted.
- We considered only multicampus universities that have—in addition to local boards—an overall governing board responsible for the entire structure with more than one campus under its jurisdiction. Governing boards of institutions and systems in states with powerful, centralized coordinating commissions were not considered to be local boards.
- To focus the study, we did not examine multicampus community college systems, although they are widespread. Two-year branch and regional campuses were included, however, if they were units of a senior college or university.

## The Political and Social Environment

Trusteeship in these complex structures does not function in a vac-

uum. Clearly, public policy and social agendas complicate higher education governance. Although trustees and senior administrators face a broad range of issues and problems, four are especially relevant to this study.

**1. Skepticism and hostility.** Public opinion polls indicate that society is increasingly skeptical, cynical, and even hostile toward many of our once-respected social institutions. Higher education is not immune. Higher education is increasingly accessible for students, faculty, and administrators of both genders and most ethnic and racial groups. Large numbers of citizens are involved in education as students, faculty, trustees, administrators, staff, volunteers, and family members—as are a growing number of external constituents, including those who largely depend on education's economic strength. One might assume that the extent to which education has "intermarried" with its environment would enhance public understanding and support—and perhaps affection—if only from self-interest. As public trust has deteriorated, effective trusteeship, with numerous opportunities for informed citizen participation, is essential to reclaiming that trust.

**2. Do more with less.** Taxpayers and politicians expect public higher education to expand its services and capabilities but state appropriations—as a fraction of public universities' total operating budgets—have remained stagnant at best. Higher education, once considered beneficial to society at large and thus a high priority in state budgets, is now seen as beneficial primarily to the individual. Consequently, advocacy by students, faculty, and administrators often is viewed as self-serving. For this reason, those who serve higher education *pro bono* potentially are its most convincing advocates. Well-informed, supportive, and committed public university trustees can make the case for financial support from both government and private sources with a balanced approach that addresses broad multi-institutional concerns and campus-specific issues.

Although advocacy usually is perceived as seeking and obtaining financial resources, it also includes other matters. Advocates can contact local officials to obtain a zoning variance, a widened public access road, or a traffic signal at the campus entrance. They can encourage employers to provide internships for students and jobs for graduates, and arrange for visiting lecturers, factory tours, and donations of business equipment. The existence of local boards has enhanced the potential for successful advocacy while attracting citizens whose contributions might otherwise have been overlooked.

**3. Diffusion of governance authority.** As higher education's reach and impact have increased, its governance has become more complex and diffused. We now have a "trusteeship governance continuum" that reaches from the campus through governing boards to statewide coordinating commissions and, in some cases, to state legislators and governors. Some

may argue that local boards are not essential participants in the trusteeship governance continuum because, to a major extent, they make recommendations rather than final decisions. Yet in formal meetings and through personal contacts, local board members often directly influence decisions affecting the head of the campus and the governance structure of the entire system or multicampus university.

Although public-sector governing boards are held legally accountable, they tend to find their decision-making authority circumscribed. Campus-based groups, particularly faculty, have influential roles in governance. At the state level, coordinating boards exert governance authority when they review institutional missions, make budget recommendations and allocations, and approve or even terminate programs on single campuses. Moreover, some governors retain *de facto* (if not *de jure*) control over the appointments of system heads, presidents, and chancellors.

Many other factors also limit boards' final decision-making authority: state financial regulations, collective bargaining agreements, civil service policies, court decisions, accreditation requirements, alumni and institutional traditions, conditions attached to major grants and donations, restrictions on public funding, and pressures from students, faculty, graduates, and parents. With so many interested constituents—including assertive local boards—governing boards and their staffs can be squeezed from many sides at once.

**4. Centralization versus decentralization.** These tensions rarely are resolved. Economies of scale, accountability and broad oversight, the tendency of local groups to advance narrow, parochial causes, and the growing ease of electronic communication provide arguments for centralized planning and decision making. Others maintain that those closest to the action are best suited to reach decisions and must be empowered if the organization is to be responsive to those it serves.This conflict is hardly new. Almost a century ago, the people of South Dakota amended their constitution to abolish institutional boards of trustees under the state's board of regents because of "constant warfare between the Regents who were charged with responsibility for all, and the several boards of trustees, each engaged solely in advancing the interests of its own schools."

Many challenges facing public higher education are state and nationwide; planning, prioritizing, advocacy, and communication often must be conducted at these levels. It is not surprising that some elected state officials favor having one contact with higher education. If nothing else, overall governing boards can offer a broad perspective not held hostage by regional and institutional competitiveness. On the other hand, in a trustee governance structure that relies only on a central perspective, important regional issues may be missed.

## The Underestimated Impact of Local Boards

Many more people participate in trusteeship than one might have imagined. The number of states with local boards and the importance of such bodies have grown in recent years. The number of citizens serving at any level of trusteeship varies widely by state. In states with no local boards (and perhaps in some with few systems, multicampus universities, or free-standing universities), there may be only 50 or 60 laypeople who monitor, report on, and champion public higher education. In states with local boards, that number easily may reach 500 or 600! While this kind of "small army" can provide many benefits, it also requires staff support and coordination. Still, numbers alone are not the only factor in assessing their importance, benefits, and liabilities.

***In states with no local boards, there may be only 50 or 60 laypeople who monitor, report on, and champion public higher education. In states with local boards, that number easily may reach 500 or 600!***

Staffs of some coordinating and governing boards are unaware of either the existence of local boards in their state or organization or the extent of local boards' roles and activities. In some states, no statutes or university bylaws authorize or prohibit local boards; apparently, some campus heads have created them as "advisory councils" without consulting state authorities. In some cases, local board members themselves underestimate their own roles and potential impact on their campus and the overall structure. Compared to the central governing board—with some exceptions—they have a less precise view of their duties and relationship to the overall university or system, its governing boards, senior administrators, and other constituents. By contrast, some states and campuses view local boards as strongly influential. The Maryland General Assembly mandated a local board for the university system's flagship campus to enhance its ability to compete for visibility, support, and resources with other universities in the system.

This report cannot offer a detailed discussion of every multicampus university or system. Instead, in the sections that follow, we list by state the systems and multicampus universities with local boards as of spring 1994; present an overview of the more and less common activities of local boards; and summarize the range of activities of local boards.

The paper concludes with observations and recommendations on local boards, noting advantages and disadvantages, membership, leadership, activities, and roles in their system or university.

## Local Boards: Where They Are and What They Do

Twenty-eight states have systems and multicampus universities that

use local boards; Table 1 lists these states and institutions. Table 2 lists the 22 states in which there are, apparently, no local boards. Some of these states have no multicampus public universities or systems. (That is also the case in the District of Columbia.) Systems and universities without local boards still may have channels for communication, advice, and advocacy by area citizens. In geographically compact systems and multicampus universities, governing board membership usually includes many citizens from the service region and therefore provides a close link with the area. Institutions also may have foundation boards that carry out some of the activities of local boards, including advocacy, advice, and communication. For that matter, informal and person-to-person relationships and communication may have the same effect as a local board even where one does not exist. Still, the local board offers a structure to ensure regional input in planning and decision making, and to organize communication, discussion, and participation.

*The local board offers a structure to ensure area and regional input in planning and decision making, and to organize communication, discussion, and participation.*

Local boards have become increasingly active. Some activity appears typical from state to state; others are more unusual. Following are lists of both common and uncommon roles. Of course, particular states have specific expectations and exceptions; we note the most significant.

**Most Common Areas of Activity and Responsibility**

Local boards typically have the following responsibilities:

- Serving as a conduit of communication among external, regional constituents, the campus in general, and its chief administrator in particular. In Alaska, for example, the governing board's operating policies dictate that the local board's chief line of communication with the overall university system is through the campus head; this is the case in many other states.
- Becoming advocates on local (and in some states, statewide) issues, public and governmental relations, and financial enhancement. For example, local boards in West Virginia are required by statute to assist in regional economic development and in obtaining internships and employment for students upon graduation. On occasion, local boards cooperate with the campus' foundation in fund-raising; local boards at the State Colleges in Massachusetts, for instance, are expected to monitor the performance and activities of campus-related foundations, and there are some joint board memberships.
- Assessing campus priorities in light of area needs, providing advice, and making recommendations via the campus head to the system's or university's senior administrators and governing board.

In Ohio, for example, the state legislature and the coordinating board of regents now require enhanced regional participation in setting priorities for branch and regional campuses; local boards, where they exist, are expected to play a major role.

- Participating in the search for the campus head and making recommendations to the senior administrators and/or governing board (and frequently, in periodic performance evaluations). The actual formal appointment and termination, however, is reserved to the governing board.
- Reviewing student life issues and hearing student appeals. Local boards in North Carolina hear student appeals; at the State University of New York, local boards bear major responsibility for overseeing student life in general. In Utah and Massachusetts, local boards also consider certain aspects of student life policy and standards.
- Meeting with visiting accreditation teams.
- Participating in plant planning and maintenance for real property that the local boards have helped acquire or for which board bylaws may hold them accountable (including, for instance, selection of building sites and architects, approval and acceptance of contracts, and final acceptance of completed projects).
- Making suggestions for honorary degrees and participating in academic convocations.

### Least Common Areas of Activity and Responsibility

With some exceptions, local boards generally are not responsible for the following:

- Establishing institutional and/or campus mission, except as they encourage the campus to address regional concerns.
- Faculty issues (appointments, promotions, tenure, and so forth).
- Academic program planning, standards, and review, except for making suggestions based on regional needs.
- Investment management
- Personnel matters for administrators, faculty, and staff (other than the head of the campus), or hearing employees' appeals.
- Relations with coordinating boards, other state and national higher education societies, and associations.
- Developing broad campus or institutional policies or issuing managerial or policies directives.
- Entering into major contracts and agreements. However, local boards in Indiana, New Mexico, Ohio, Oklahoma, Pennsylvania, and South Carolina have entered into contracts with public colleges and universities to offer courses, programs, and degrees in their region, often at facilities they have helped develop. In North Carolina, local boards may enter into contracts with vendors within financial limits

established by the board of governors. The permission to enter into such contracts is usually based on state education law.

- Conducting and overseeing collective bargaining and resulting agreements.
- Reviewing and assessing institutional effectiveness and compliance with state, federal, and system/university policies and regulations. In Utah, however, local boards are expected by law to "monitor and report." Similarly, in North Carolina, Massachusetts, New York, and West Virginia, local boards are involved, but the final review of decisions is reserved to the governing boards.
- Approving operating budgets. However, in New York, North Carolina, Utah, Massachusetts, Alaska, and Oklahoma, local boards are consulted before budgets are submitted to the system/university.
- Overseeing intercollegiate athletics, with the exception of Utah.

**Influence and Authority of Local Boards**

The general character of local boards can be summarized in terms of the significance and range of their duties and authority, communication and interaction with the governing board, and the source of their appointments. We can classify the boards we studied in seven categories, according to their level of influence. (Because influence often goes hand-in-hand with the way a board is established and its members appointed, the categories also are defined in part by these characteristics. States with more than one system or multicampus university may appear in more than one grouping. Also, in at least four states—Indiana, Missouri, Ohio, and Pennsylvania—one system or multicampus university has local boards that fit in different categories.)

***The general character of local boards can be summarized in terms of the significance and range of their duties and authority, communication and interaction with the governing board, and the source of their appointments.***

**1. States that give local boards the greatest range of duties and largest roles in governance as delegated by legislation, the governing board, or both.** The local boards in Alaska, Massachusetts (the State Colleges), New York (the State University), North Carolina, the Pennsylvania State System of Higher Education, Utah, and West Virginia have the broadest array of specific duties of the various boards we examined. Although there are differences among these systems, they share a number of commonalities. Six factors, in particular, enhance the roles of these local boards:

- They are specifically authorized by a higher authority beyond

the campus—usually in state law, but at least in university system policies and bylaws, and sometimes in both.

- Their members are appointed by governors, legislatures, and university system governing boards.
- They exist at all campuses within the university system, including the leading doctoral degree and research university campuses.
- Their areas of advice, review, and advocacy touch upon most topics usually associated with trusteeship.
- Although they do not have final decision-making authority in all areas, they generally do in certain ones or, at the very least, they have the right to review the recommendations of the campus head and to approve them or propose that the governing board reject them.
- Their roles in the trustee governance continuum are clear.

Even in these cases, however, the governing board retains substantial decision-making power, and the university system is considered one entity. This is expressed most clearly by the fact that, ultimately, the campus heads are employees of the governing board, which retains the authority to appoint and terminate them.

**2. Local boards in multicampus universities created by governmental and/or university authority.** Some local boards in Indiana, New Mexico, Ohio, Oklahoma, and South Carolina have been legislatively authorized or created with membership and authority outside the jurisdiction of the multicampus universities with which they are affiliated by contract. Typically, these boards are legally organized citizens' groups that initiated a relationship with the senior public university with the goal of persuading the university to establish a campus in their region. Often, the boards obtained funds for property and facilities, and some of them—in New Mexico, Ohio, Oklahoma, and South Carolina—own or rent real property used by the universities.

These boards exist separately in law with specific decision-making authority that is not conferred by the university. Because of this, they may not be, in the narrowest sense, components of the senior university; they are, perhaps, "in" but not "of" the university. By contract, the boards defer to the college or university on academic issues, but there is generally an expectation that the boards will be consulted on major issues, such as the search for a campus head. This kind of local board exists at certain campuses within Indiana University and Kent State University (Ohio). However, most of the local boards in Indiana and Ohio were created by or have become integral governance units of the multicampus university, with their members appointed by the university's governing board or chief executive officer.

**3. Local boards with some members also serving on the overall governing board.** There are a number of multicampus universities and

systems that prohibit citizens from serving on both; North Carolina is one example. Yet at least six multicampus universities and systems specifically provide for members of one board to serve on the other, complete with full voting rights. They are Auburn University (Alabama), Indiana University, Ohio State University, the Pennsylvania State System of Higher Education, the University of Pittsburgh, and the University of Virginia.

In the Pennsylvania State System of Higher Education and, in a recent change, the University of Pittsburgh, local board members serve on the governing board. The reverse arrangement in which governing board members serve on local boards is found in Auburn University, Indiana University, Ohio State University (a recent step), and the University of Virginia. In the Pennsylvania State System of Higher Education and Auburn University, the arrangement is legislatively mandated. Apparently, this type of joint appointment was undertaken to enhance communication between the levels of boards, bind them closer together, and express increased respect and support for local boards. Such dual assignments place an increased burden on the citizens who accept them, but in the case of Indiana University and the Pennsylvania State System of Higher Education, these arrangements have been in operation for a number of years and have not proved impossible.

**4. Local boards created by legislation but with limited authority.** These include boards in Southern Arkansas University, California State University, the University of Kentucky, the University of Maryland System, and the University of Massachusetts. These local boards have been created, mandated, or authorized at some or all of the campuses of multicampus universities and systems and given a very limited range of duties and authority. The boards are primarily responsible for advice and advocacy, but also have an implicit or explicit role in the search for the campus head.

**5. Local boards with limited authority, created as statutory successors to governing boards of previously free-standing public or independent institutions.** This is the case at the certain campuses of the University of Arkansas, the Kansas Board of Regents System, the University of Missouri, and the Montana University System.

Some public multicampus structures include constituent units that were once separate public or independent institutions. Before joining the larger structure, these colleges and universities had been governed by a board that oversaw only that institution, perhaps under a different name. In these cases, the state assumed responsibility for the institution's liabilities, along with acquiring its assets. In most of these instances, the earlier governing boards simply ceased to exist. However, in Arkansas (Little Rock and Pine Bluff), Wichita State University in Kansas, and the University of Missouri-Kansas City, local boards exist that are heirs to their original, independent boards, regardless of whether local boards exist at

other campuses of the university. And in Montana, all senior institutions have such "heirloom" local boards with circumscribed powers.

**6. Local boards appointed by the governing board or by the most senior administrator of a system or multicampus university, with recommendations for membership coming from the local board itself and/or the head of the campus, with limited areas of responsibilities.** This category includes the University of Michigan, Ohio University, Pennsylvania State University's Commonwealth Educational System, the University of Virginia, the University of Washington, Washington State University, and the University of Wisconsin System.

The governing boards of multicampus universities in six states formally recognize local boards by authorizing their existence in their bylaws, and/or by appointing the local board members, or having the chief executive officer of the university or system appoint them. Beyond this authorization, however, there seem to be infrequent—if any—contacts between the governing board and local boards. The local boards are truly "local"—that is, campus-oriented, with their primary focus on advice to the chief campus administrator, communication between the campus and its service area, and advocacy. The University of Wisconsin System has some local boards created as part of governing board policy and a few local boards created solely by a campus head without any formal arrangement with the system. The local boards at branch campuses of Washington State University and the University of Washington are rather new creations, and their roles apparently have not developed clearly.

**7. Local boards that are primarily advisory boards to the campus head, who may have created the board or appointed its members.** This type of board exists at one or more campuses of Troy State University System (Alabama), Louisiana State University, Southern University (Louisiana), University of Missouri, City University of New York, North Dakota University System, Oregon State System, and the University of Wisconsin System.

Some campus heads created and developed local boards and recruited members to communicate with their service region, obtain advice and insights, and gain financial support. The lack of authorization to create a local board has not deterred some campus heads from such a move unless specifically prohibited from doing so, as happened in one system in Louisiana. Because of the informal nature of their creation, more of these boards may exist than the study revealed. These local boards may have the least significant role to play in the trustee governance continuum because they are not "legitimized" by a higher authority. Still, the importance of their members in the business or political worlds (at times exceeding that of some members of governing boards) may give them considerable influence.

## Observations and Recommendations

Following are observations in four areas—membership, leadership, activities, and organization and structure—that emerged in the course of the study. Along with these, we cite recommendations in each area, as well as some of the problems and potential pitfalls often confronting both local boards and governing boards.

### Membership

Local board members are appointed in a variety of ways. They may be appointed by a governor (with or without legislative consent), the legislature, county officials, campus head, or the governing board or chief executive officer of the system or multicampus university (with or without suggestions from the campus head and/or the local board). They also may be *ex officio* (graduates, students, faculty, administrator, legislator), self-perpetuating, or elected.

The campus head often is responsible for identifying and appointing or nominating local board members. Not only does this arrangement create a strong distinction between local boards and governing boards, it also gives the campus head opportunities for regional public relations, development, and professional support similar to those available to presidents of independent institutions. However, in those cases where local boards have the greatest influence, appointments are made beyond the campus level.

***The campus head often bears major responsibility for identifying and appointing or nominating local board members.***

Local boards raise competing expectations regarding the kinds of citizens to be appointed. Board membership should be diverse and broadly reflect external constituencies and the population. At the same time, members must be qualified, demonstrate both integrity and interest, and offer the potential of exerting influence on behalf of the institution with-out representing narrow interests or causes. In most cases, members of local boards are drawn from the region in which the campus is located. However, a few members come from other parts of the state in recognition of the campus' outreach.

With some exceptions, faculty and students from an institution are less likely to serve on a local board than on an overall governing board. However, students and faculty do interact with members of local boards—for example, when faculty and student representatives serve with the board in searches for the head of the campus. Some additional observations on membership follow:

- Some boards limit terms; on others, members may be reappointed

without limitations.

- Occasionally, some particularly visible and effective local board members are appointed to the governing board at the end of their local board term.
- Formal orientation programs for new members are more rare among local boards than among governing boards, but they do exist and are worthy of emulation. Some local boards have prepared handbooks to orient members and guide them throughout their tenure. The State University of New York and the Pennsylvania State System of Higher Education publish newsletters by and for local board members to enhance involvement and their participation. Most often, though, orientations are conducted informally by the campus head, perhaps with help from the local board chair.
- A local board's influence is directly related to the calibre and commitment of its members. As one experienced local board member put it, earned influence and authority are far more important than statutory authority. This same person emphasized that if "local boards want to be heard" by administrators and by a senior governing board, "they must have something useful to say!"

**Recommendations**

- Having local board members appointed by more than one source can provide diverse perspectives and increase opportunities for communication with important constituencies.
- Both local and governing boards should avoid narrow representational memberships.
- Local boards should consider establishing term limits for their membership. Some local board members have served for decades, and in some cases this presents understandable difficulties in relationships with many constituencies.
- Orientation services (programs, printed materials, and meetings) should be provided for members of both governing boards and local boards regarding the law, standards of governance in higher education, conflicts of interest, codes of ethics, and special issues and structures within complex organizations. Special orientation programs should be provided for board chairs at all levels.
- Participants at the local level must be given an orientation and a continuing education that assures them of input but does not promise final concurrence with their recommendations by the governing board.

## Leadership

The effectiveness of local boards depends to a significant degree on ability of the campus or institutional head to guide and empower the local board and its members. At independent colleges and universities, board development is a major responsibility of the president or chancellor, and

these leaders often come to their office having worked with boards or board committees while serving as a dean or vice president. Yet many educators assume leadership positions in public higher education with limited experience in working with boards and their members.

In states that hold annual statewide governance conferences involving local boards, governing boards, and coordinating boards as well as institutional and campus leaders, there seems to be a stronger sense of cohesion, understanding, and support. Such conferences are well received by board members and contribute to a sense of teamwork. However, because of time constraints, some members of both local and governing boards expressed frustration that they cannot participate more actively in governance activities—including such conferences—and urged that these programs be kept as brief and focused as possible.

Campus heads often emphasize the importance of reporting directly to governing boards rather than to a system head or multicampus university president. However, this raises a concern: If there are local boards, foundation boards, or coordinating boards in addition to a governing board, presidents may find themselves spread too thin in reporting to or providing staff support for these multiple boards—especially if these boards are contending for recognition and authority.

***If there are local boards, foundation boards, or coordinating boards in addition to a governing board, presidents may find themselves spread too thin in reporting to or providing staff support for these multiple boards—especially if these boards are contending for recognition and authority.***

**Recommendations**

- Campus and system administrators must better understand and work with boards in general, and lead and guide local boards.
- Local board chairs and senior administrators at campus, system and university levels must enhance the effectiveness of governance at all levels, from orientation to continuing education.
- Leadership in trusteeship is the duty of overall governing boards, according to an experienced trustee who has served on boards at both levels. Governing board members must view local boards as part of the same team and work to foster their success.
- Annual or biennial statewide conferences geared to the needs of members of local, governing, and coordinating boards can clarify roles and duties, and address major challenges, issues, and opportunities. Programs and schedules should accommodate busy, active board members. Interactive telecommunications can reduce time and distance problems. To be effective, such conferences should be considered major events for public higher education and receive adequate

financial support from state government.

- When revisions in governance structures are being considered, care should be given to avoid having senior administrators—especially campus heads—report directly and be accountable to more than one board.

**Activities**

In general, members of local boards tend to underestimate their governance roles and activities—as do administrators who work with them on campus or in a central administration. With proper, careful planning and coordination by senior administrators and the overall governing board, local boards can be involved effectively not only in community level issues, but also regional and statewide issues.

Local boards often have their greatest influence as a conduit of community contact for the campus' chief executive. They can assist the institution and its leaders by playing the role of constructive critic, warning of pitfalls, and identifing needs. In addition, they balance and legitimize planning and priority setting, focusing on regional outreach.

***Local boards often have their greatest influence as a conduit of community contact for the campus' chief executive.***

Whether or not statute or bylaws require, most local boards are invited by a system head or multicampus CEO to participate in the hiring process for the campus' chief executive—perhaps the most important activity of any board. Rarely, local boards play a formal role in establishing and reviewing institutional mission and strategic planning. In some states—those with and without local boards—even the overall governing board must defer a final decision in such matters to a coordinating body. However, when local boards convey regional educational needs to administrators, they exert an influence on institutional and even system priority setting. Frequent contact is rare between local boards and advisory bodies supporting specific academic programs or schools, perhaps because local boards generally play almost no role in academic affairs. However, local board members commonly meet with accrediting teams as part of the campus visit and review.

Local boards generally communicate with the governing board via senior administrators rather than through regular, formal contact. Such direct contacts can create serious policy and managerial difficulties when they bypass senior administrators. We noted several other common problems, including the following:

- Some members of coordinating, governing, and local boards have difficulty lobbying state officials because the interests of public

higher education may conflict with their own professional or business interests.

- Local boards may be hindered in their efforts to enhance communication and advocacy when they have little information about campus problems and weaknesses, accomplishments and strengths.
- In general, members of both governing and local boards expressed frustration that time constraints keep them from being more familiar with institutional concerns. While efforts to encourage communication and involvement among members of governing and local boards are beneficial, they are time consuming for busy community leaders. In short, memberships must have meaning and meetings must have outcomes. Otherwise, members either become apathetic and drift away or they busy themselves with internal contacts and micromanagement.

**Recommendations**

- Governing and local board members must be well informed about the institution if they are to be effective advocates.
- Local board members should be consulted regarding planning and priority setting. They often have good insights and their involvement is essential if they are to remain active and interested.
- Governing and coordinating bodies at all levels should regularly evaluate their performance in light of statutory requirements, public expectations, and their perceptions. Boards should set annual and multiyear goals for themselves and their institutions against which they can measure their achievements and issue annual reports.
- Leaders of systems, multicampus universities, and their constituent units must consider ways to encourage hundreds of lay participants to be advocates for the institutions and systems they help oversee. As *pro bono* leaders, they can speak to public officials without being accused of seeking personal gain. Considering the indifference (at best) and mistrust (at worst) that exists between higher education and many state government officials, board members at all levels are key players in bridging this gap.

## Organization and Structure

Local boards may exist in statute, bylaws, or both and may have come into existence in several ways, as described earlier. In at least four states, local boards within the same system or multicampus university came into being in different ways and by different authority.

As mentioned, in some systems and multicampus universities, several board members may serve at both the local and governing board levels. And in a few cases, local boards are also foundation boards (and vice versa), or there is an overlap in membership. This is rare, however,

because institutionally affiliated foundations are separate legal entities, no matter how close their relationship to the institution. In at least one case (Massachusetts' State Colleges), the local board bears some oversight accountability for the foundation's management and, therefore, holds *ex officio* seats on its board. In some cases institutions without a local board may use a foundation board for similar purposes, especially for advocacy, advice, and communication. The foundation may be actively involved in presidential searches.

***Most local boards are invited by a system head or multicampus CEO to participate in the hiring process for the chief executive—perhaps the most important activity of any board.***

Some educators and trustees in states without local boards expressed doubts about the benefits of such bodies, especially if their existence seems to dilute governance and give senior administrators "too many masters." However, we encountered no campus head, system head, or governing board member who expressed the desire to abolish existing local boards.

While local boards constitute an extra layer of governance, they offer some benefits to the overall governing board—and, by extension, the state. They enable the governing board to focus on broader, more global issues. Also, with the existence of local boards, governing board members may be less likely to view themselves or be viewed by others as representing particular constituents or geographic regions, thus avoiding regionalism and institutional parochialism.

In one state, senior administrators in the state capital and at a university's vice presidential level voiced quite different views of a legislative initiative to enhance local boards. State coordinating board staff saw this as a step to *decentralize* control and encourage input by area citizens. At the same time, staff in the universities' central administrations saw the process as a state effort to *centralize* control. After all, local citizens were being encouraged by state authority to consider and emphasize specific aspects and priorities of campus mission—such as service to the citizens and employers of the region—perhaps at the cost of distinctively institutional perspectives.

The creative tension between the two levels of boards does provide some potential for conflict. As one administrator put it, there is a tension between "advice" and "authority" and "a greater tolerance for ambiguity when things are going well." This is hardly surprising, given that active, results-oriented community leaders are chosen to serve on local boards. They may press for greater power and influence in return for their commitment of time, advice, and advocacy. In turn, administrators and governing board trustees are wary of causing confusion or stirring up

dissatisfaction regarding the roles of local boards and the relationships of their members to the governing board's decision-making processes. Leaders need to maintain clear roles, keep local boards vital, provide sufficient staff support, and attract qualified and committed members who will faithfully attend meetings, especially when they serve as advisors rather than decision makers.

We also noted the following related areas of potential difficulty:

- In every system and multicampus university, the formal appointment of a campus head is made by a central authority—usually the overall governing board, and sometimes (as in the case of some directors and campus deans) by the chief executive of the system or university. If a local board has played a major role in the search but the governing board is the actual employer, tensions may arise from divided loyalties and shifting expectations on the part of the campus head and the local board.
- In those cases where members of local boards have considerable influence and where either the legislature or a coordinating agency tend to micromanage or hold significant authority, the overall governing board can find itself caught in the middle; in these cases, its own powers are subject to major pressures that limit its ability to plan and manage effectively.
- While there are noteworthy exceptions, there seems to be little communication among members of various local boards within a university or system; attempts to encourage communication often have not succeeded. Busy laypeople tend to feel there is more symbolism than substance to such efforts.
- Some local boards have helped to hold the entire structure together because they see advantages and resources available by being a unit of a system or a distinguished and respected university. By contrast, other local boards—occasionally within the same structure—have exerted pressure that has transformed a branch campus into a free-standing college or university.

**Recommendations**

- To reduce misunderstandings and increase effectiveness, all structures with local boards should develop specific statements of duties, powers, and responsibilities including the power to recommend policies and courses of action for the various administrative officers and lay boards. Wording in these statements should distinguish roles as clearly as possible even if this requires modifying language used in statutes or bylaws.
- Governing boards should identify areas of governance in which they can and should delegate appropriate activities to local boards.
- The top administrators on campus and at the system headquarters should establish and cultivate formal linkages between the govern-

ing board and local boards.

- In structures with numerous campuses, the system's central administration should recognize, support, and staff an association of local boards.
- "Errors and omissions" insurance programs should cover members of local boards.

**Local Boards Make A Difference**

Review of governance structures is always under way. In most years, one or more states will be debating and implementing organizational changes. While this report must remain a work in progress, it may help those who are deliberating possible modifications. To be sure, no single governance structure will serve the best interests of all citizens and all public colleges and universities all of the time. Nonetheless, the combination of an overall governing board and local boards seems to offer ways in which trusteeship can provide broad oversight and accountability along with sensitivity to campus and area issues in most areas of governance. This is particularly true in complex, large, or geographically dispersed structures.

Local boards seem to be an effective way of facilitating citizen input and communication among internal and external constituents at the campus/institutional level. When local boards are part of the governance continuum, conscious efforts should be made to seize the advantages they offer in planning, advice, advocacy, communication, feedback, and, as appropriate, oversight and guidance.

This should include a thoughtful combination of centralization and decentralization—even if the pace of decision making slows somewhat. In large states and complex institutions, both forces are at work. The benefits of central planning, shared resources, and statewide oversight and advocacy exist compatibly with local initiatives and advice from the trusteeship of area citizens—as long as communication is maintained and shared concerns are identified and addressed. Although final planning, mission, and priority decisions may be reached centrally, the process leading to the decisions can be decentralized. This can help leaders gain the best and most complete information, develop sound priorities and goals, and reach the wisest decisions.

Local boards offer educators, political and community leaders, and governing board members additional opportunities to appoint citizens of superior character, commitment, influence, and ability to governance positions. And in complex structures that include institutions with different missions, local boards can provide valuable support on behalf of an institution's distinctive mission.

Few people are aware of the extent and impact of local boards. They

exist in far greater numbers than many educators seem to realize. In states with local boards there may be as many as 600 citizens participating at various levels of trustee governance. In many cases, local boards play a far greater role in governance than even their own members may perceive. Moreover, in recent years the roles and expectations of local boards appear to have increased. Their members have been accorded additional stature in several institutions. Several multicampus universities and systems have emphasized the importance of communication between local and governing boards by making formal provisions for some members to serve at both levels. Perhaps most interesting, we could find no instance in which any formally recognized local boards had their roles diminished or abolished, except when a previously free-standing college or university became part of a larger multicampus university or system.

The effective participation of informed, committed local and regional citizens in public higher education governance is crucial to building and maintaining public confidence, enhancing communication among constituents, and providing effective advocates who understand institutional goals, needs, assets, and liabilities. They also encourage and advise, provide oversight and demand effective performance, and maintain a focus on the individual campus as the key point at which academic services are provided.

If it is not feasible to create local boards, leaders should identify other ways to accomplish these goals. Where local boards exist, we urge educators and trustees to take steps to increase their competency and levels of service to citizens. The processes of effective governance may be slowed by broad involvement, but when roles are clear and participation is encouraged, the results should be better, and, one would hope, endorsed by most of higher education's internal and external constituents.

## About The Author

Edgar B. Schick is senior fellow and consultant to AGB and the American Association of State Colleges and Universities. He served as lead coauthor of *Shared Governance of Public Higher Education* (1992), which examined statewide and system governance, coordinating structures, and operations in several states. He has more than 30 years academic and administrative experience in higher education.

**Table 1: States and Institutions With Local Boards**

| | |
|---|---|
| Alabama | Auburn University |
| | Troy State University |
| Alaska | University of Alaska System |
| Arkansas | University of Arkansas System* |
| | Southern Arkansas University |
| California | California State University [System]* |
| Indiana | Indiana University |
| Kansas | Kansas Board of Regents System* |
| Kentucky | University of Kentucky |
| Louisiana | Louisiana State University [System]* |
| | Southern University [System]* |
| Maryland | University of Maryland System* |
| Massachusetts | Higher Education Coordinating Council (serves as a "governing board" for the State Colleges) |
| | University of Massachusetts** |
| Michigan | University of Michigan |
| Missouri | University of Missouri* |
| Montana | Montana University System |
| Nevada | University and Community College System |
| New Mexico | University of New Mexico |
| | New Mexico State University |
| | Eastern New Mexico University |
| New York | City University of New York* |
| | State University of New York |
| North Carolina | University of North Carolina [System] |
| North Dakota | North Dakota University System* |
| Ohio | Ohio University |
| | Ohio State University |
| | Kent State University |
| | Miami University of Ohio |
| Oklahoma | Higher Education Centers in Ardmore, Enid, Tulsa, and McCurtain County |
| Oregon | Oregon State System of Higher Education* |
| Pennsylvania | Pennsylvania State University's Commonwealth Education System |
| | Pennsylvania State System of Higher Education |
| | University of Pittsburgh |
| South Carolina | University of South Carolina |
| Utah | Utah System of Higher Education |
| Virginia | University of Virginia |
| Washington | University of Washington |
| | Washington State University |
| West Virginia | State College System |
| | University of West Virginia [System] |
| Wisconsin | University of Wisconsin [System]* |

* Denotes institutions in which not all branch or regional campuses have a local board.
** By statute, the University of Massachusetts may have local boards, but none appear to exist.

**Table 2: States Without Local Boards**

| | |
|---|---|
| Arizona | Minnesota |
| Colorado | Mississippi |
| Connecticut | Nebraska |
| Delaware | New Hampshire |
| District of Columbia | New Jersey |
| Florida | Rhode Island |
| Georgia | South Dakota |
| Hawaii | Tennessee |
| Idaho | Texas |
| Illinois | Vermont |
| Iowa | Wyoming |
| Maine | |

## Additional Reading

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